# Retirement

## Overview

**Introduction**

This guide provides all of the details regarding a Retirement Separation.

**Topics**

The following topics are covered in this guide.


| Topic | See Page |
|---|---|
| Guiding Principles | 2 |
| The Retirement Process | 3 |
| Retirement Procedure | 5 |

# Guiding Principles

**Introduction**

This section provides the guiding principles for a Retirement.

**References**

The following references provide additional information about Retirements.

- Military Separations, COMDTINST M1000. (series)
- Joint Federal Travel Regulations, Volume 1
- Personnel and Pay Procedures Manual, PSCINST Ml000.2(series)

**Before you begin**

Coast Guard Personnel Service Center (PSC) must authorize all Retirements. Approved Retirement requests will be posted to the Airport Terminal under the member's department ID.

The status of a Retirement request/authorization can be viewed in Direct Access using the Separations Summary Report from the Separations pagelet. The Separation Authorization can now be printed directly from the Separation Details tab of the Separation Orders.

Contact PSC (epm/opm) if the member's Retirement request/authorization cannot be located in Direct Access. The Retirement separation orders should not be input in Direct Access until PSC has entered and approved the authorization.

Requests to change the Retirement date must be sent to PSC for approval and data entry.

Ensure member has sufficient **obligated service** to meet the Retirement date. The member will need to extend or reenlist if the expiration of current enlistment is before the effective date of separation (day before Retirement date).

Direct Access no longer automatically adds a Travel Order Number (TONO)/Line of Accounting (LOA) to Separation and Retirement orders. TONOs/LOAs are now added by DCMS-831 (PCS TONO Funds Manager) if the member elects to relocate upon separation/retirement to their Home of Record/Home of Selection. This change will ensure that the Coast Guard only allocates funds to members who are actually moving/incurring costs. Refer to the latest Sep/Ret TONO Process Change message.

Pay entitlements for a member who is being retired will automatically be stopped on the last day of Active Duty. SPOs do not need to manually stop pay entitlements for a member who is separating.

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## Guiding Principles, Continued

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|---|---|
| **Corrections & Deletions** | See the Amending and Cancelling Separation Orders User Guides. |

# The Retirement Process

**Introduction** This section provides an overview of how the Retirement process works.

**Process** This table lists the events that take place in connection with a member's voluntary or involuntary Retirement. This table is not meant to be all-inclusive; it merely provides an overview of the process to aid in understanding the events that must take place in order for the Retirement transaction to be input.

| Stage | When | Then |
|---|---|---|
| **1** | The member's voluntary Retirement request is approved, involuntary Retirement is directed, or physical disability Retirement is directed | PSC (epm/opm) enters the Request in Direct Access, which will create:<br>1. Separation Authorization.<br>2. Separation Orders<br><br>**Note**: The transaction is 'built' by the system but additional data entry and approval is required before it is complete. |
| **2** | Member receives the Retirement Order from their unit (via the Airport Terminal) | The member submits Career Intentions Worksheet (CIW) (CG-2045) and submits Retirement Package to PPC-RAS.<br><br>**Note:** Download the Retirement Package from http://www.uscg.mil/ppc/ras/retpack.pdf |
| **3** | Member's Command received the CIW | The Command endorses the CIW and forwards it to the Servicing Personnel Office (SPO). |
| **4** | SPO-Data Entry Technician (CGHRS) receives the CIW | The SPO tech completes the Retirement orders, entering delay en route (terminal leave), dependent data, mode of travel, etc. |
| **5** | SPO tech completes the orders | The SPO tech routes the orders for approval. They also complete the DD-214 and print it for review by the SPO Supervisor. |

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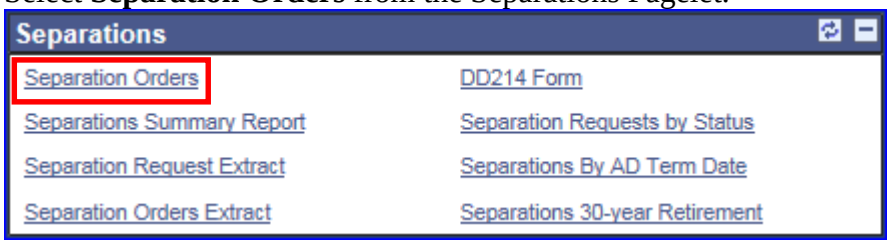
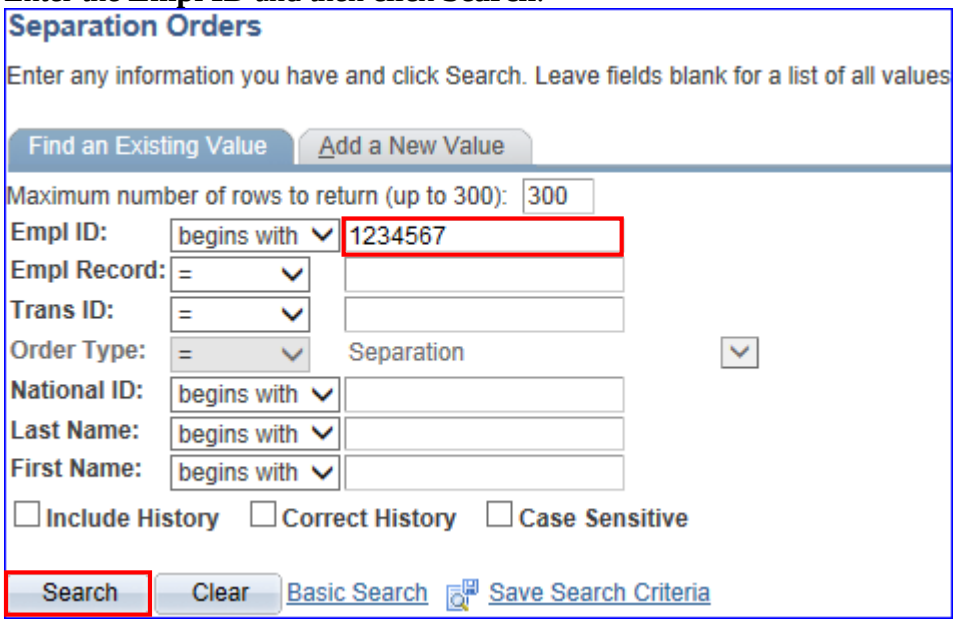
**Process**,
continued

| Stage | When | Then |
|---|---|---|
| **6** | SPO tech submits the orders | The SPO Supervisor (CGHRSUP) goes into "View My Requests" and audits and approves the separation orders<br><br>**Note**: Orders should be approved no later than the date the member departs unit.<br><br>The SPO Supervisor approves the DD-214 by going into the DD-214 component, checking the final button and printing the DD-214. This will electronically send the DD-214 to DMDC. |
| **7** | The SPO Supervisor approves the Separation Orders | The system shuts down the member's pay account in Global Pay. |

# Retirement Procedure

**Introduction** This section provides the procedures for completing a Retirement in Direct Access.

**Procedures** Follow these steps to complete a Retirement separation transaction.

| Step | Action |
|---|---|
| 1 | Select **Separation Orders** from the Separations Pagelet.<br>  |
| 2 | Enter the **Empl ID** and then click **Search**.<br>  |

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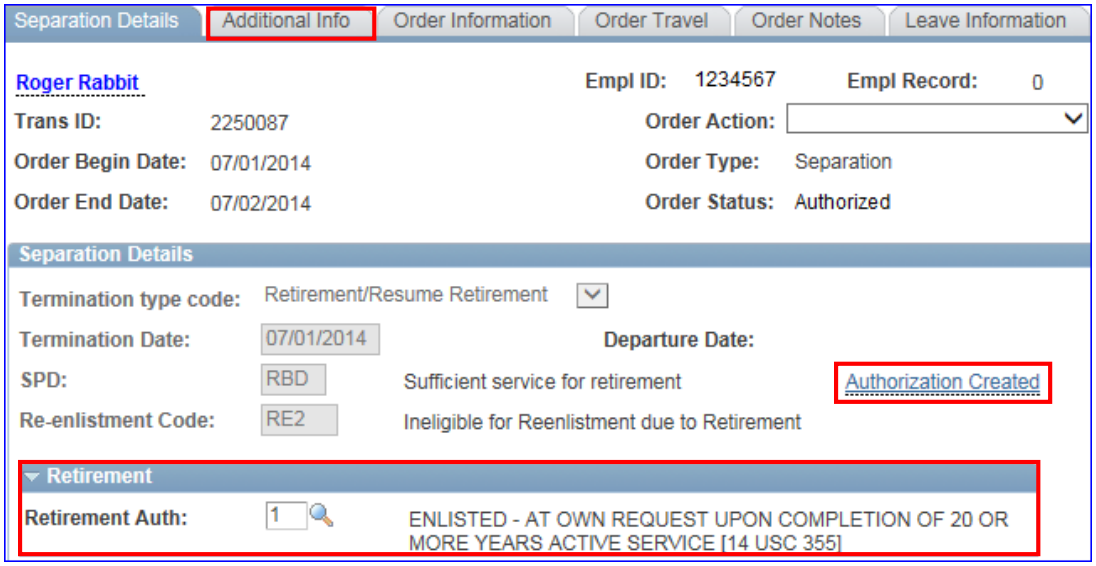
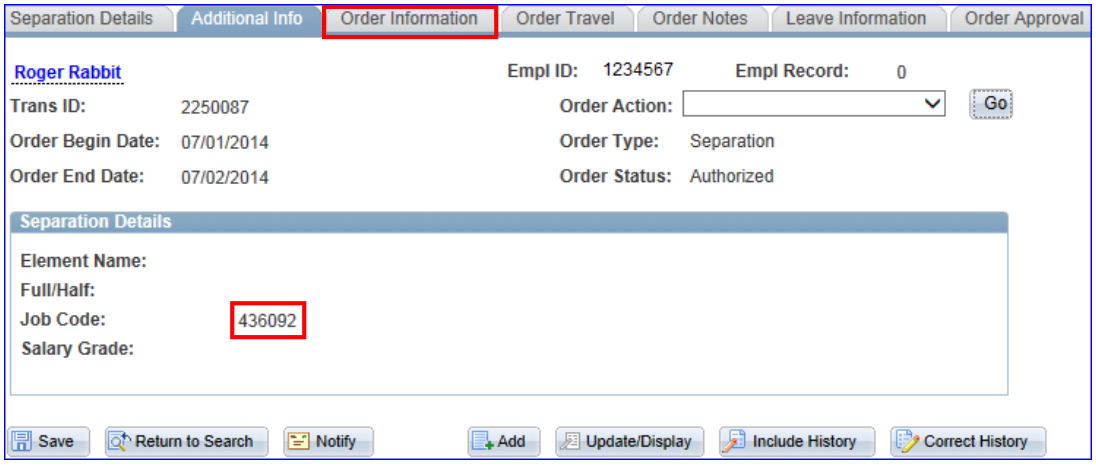
**Procedures**, continued

| Step | Action |
|---|---|
| **3** | If the Separation Request/Authorization has been approved, the Separation Orders will display. If nothing appears, make sure the Sep Request has been completed and approved. (See Airport Terminal User Guide.) Notice the **Authorization Created** link. Click on it to view and print the Separation Authorization. If the **Retirement Auth** doesn't auto-populate from the Sep Request, enter it before moving on. Now click on the **Additional Info** tab.<br>  |
| **4** | Any information on this tab was input by PSC and cannot be edited. Click on the **Order Information** tab.<br>  |

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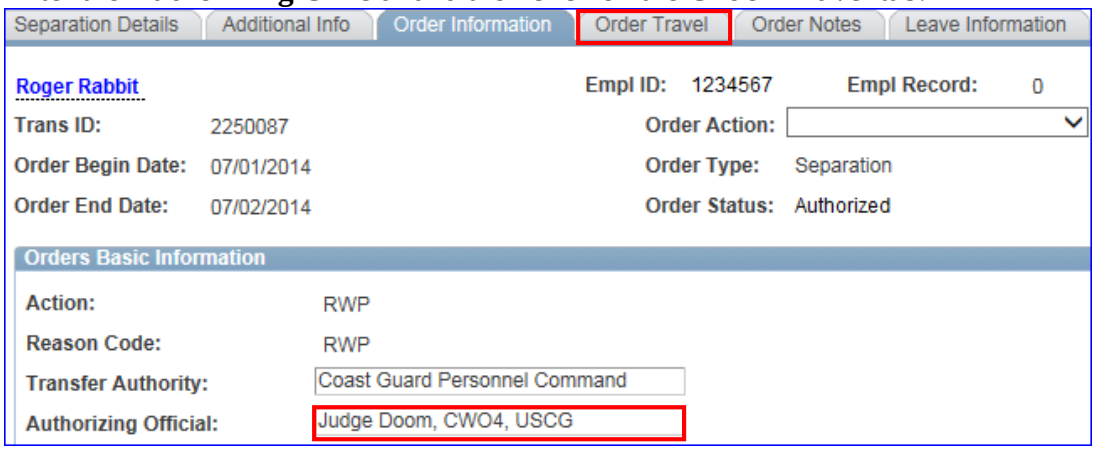
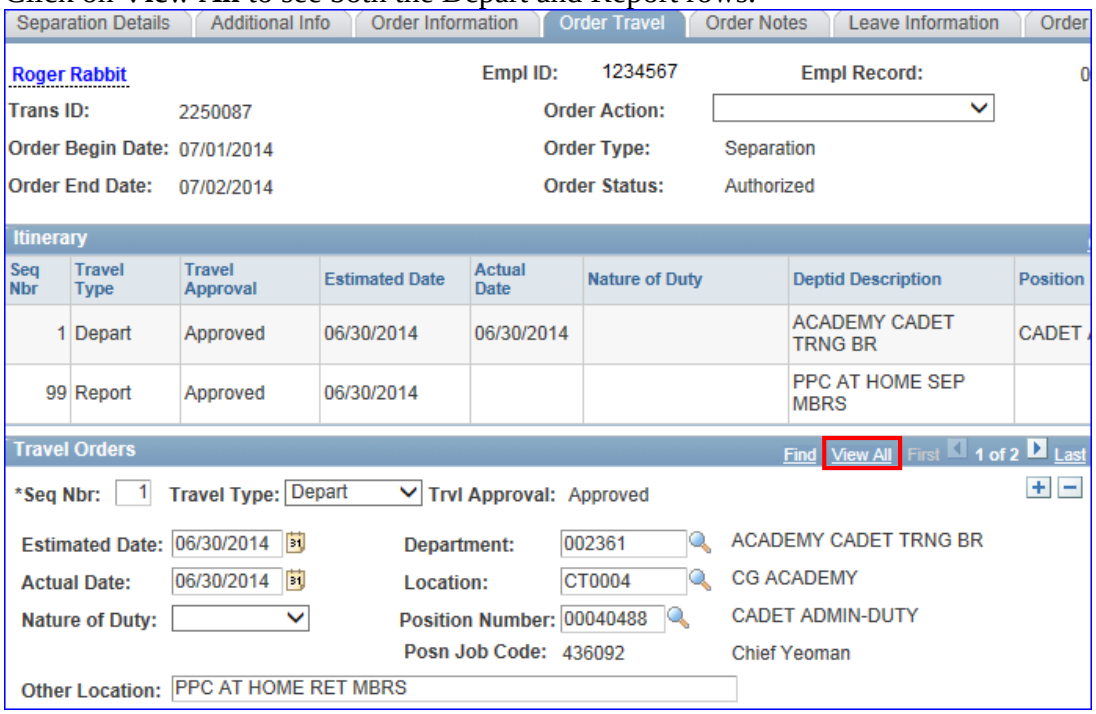
**Procedures**,
continued

| Step | Action |
|---|---|
| 5 | Enter the **Authorizing Official** and then click on the **Order Travel** tab.<br>  |
| 6 | Click on **View All** to see both the Depart and Report rows.<br>  |

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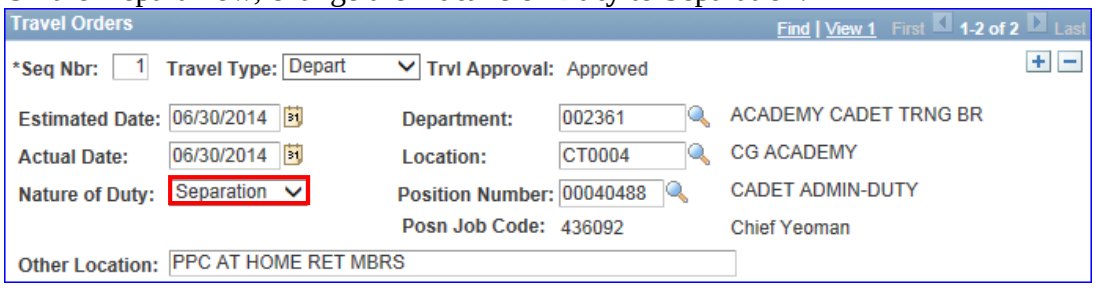
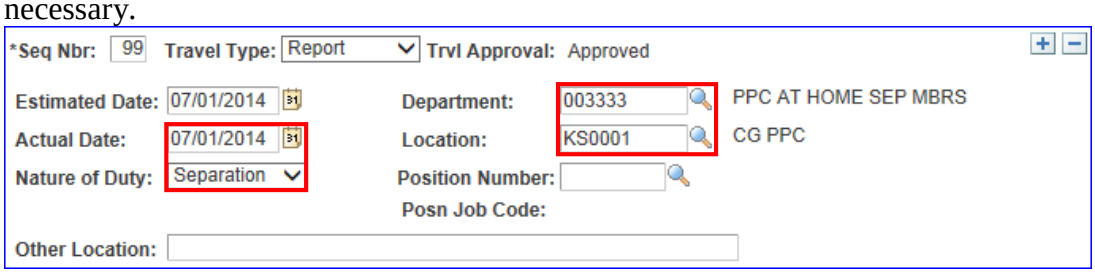
**Procedures**, continued

| Step | Action |
|---|---|
| **7** | On the Depart Row, change the **Nature of Duty** to Separation.<br>  |
| **8** | Click on the arrows to expand the **Per Diem**, **Travel Details** and **Additional Authorized Expenses** sections to add specific travel entitlements for the Retiring Member.<br> |
| **9** | On the Report row, enter the **Actual Date** (same as estimated) and change the **Nature of Duty** to Separation. Verify the Department the member will report to upon Separation (003333 PPC AT HOME SEP MBRS). The **Position Number** and **Posn Job Code** should be blank. The Report row also has the **Per Diem**, **Travel Details** and **Additional Authorized Expenses** sections that can be populated if necessary.<br>  |

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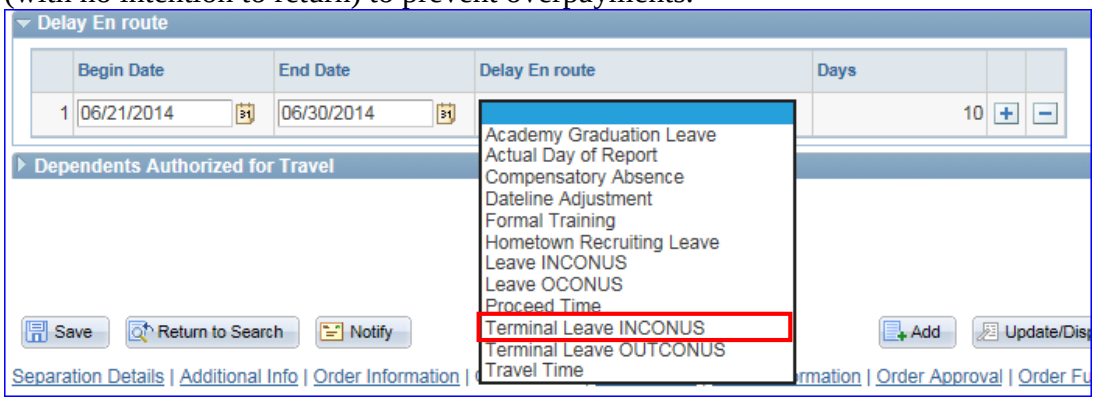
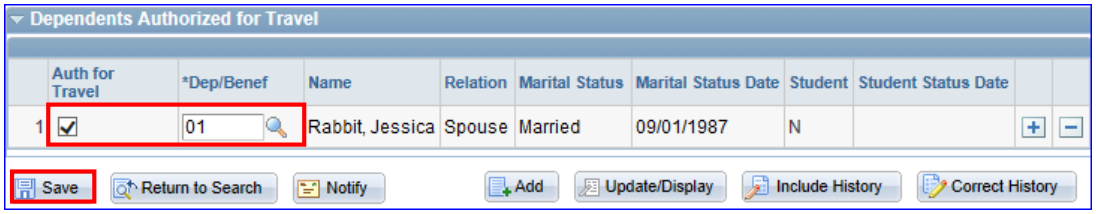
**Procedures**, continued

| Step | Action |
|---|---|
| **10** | In the **Delay En route** section, enter any time (such as Terminal Leave) that the member will be taking prior to the Retirement Date. **Any Administrative Absence and/or Retirement Processing Point Absence must be documented in the Order Notes.**<br><br>**NOTE:** SPOs MUST manually stop Career Sea Pay, Career Sea Pay Premium and OUTCONUS COLA upon the member's departure from the unit on Terminal Leave (with no intention to return) to prevent overpayments.<br>  |
| **11** | Select the appropriate **Dependents Authorized to Travel**. If the dependents don't auto-populate, use the Dep/Benef lookup to find and select each one. Then click **Save**.<br>  |

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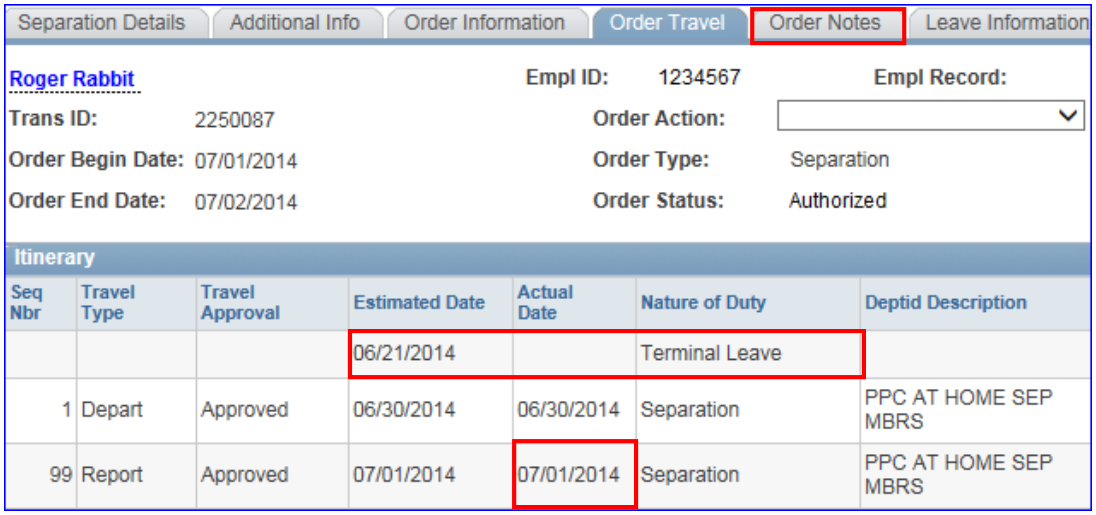
**Procedures**, continued

| Step | Action |
|---|---|
| **12** | Saving will update the Actual Date and display the Terminal Leave in the **Itinerary** section. Now click on the **Order Notes** tab. |

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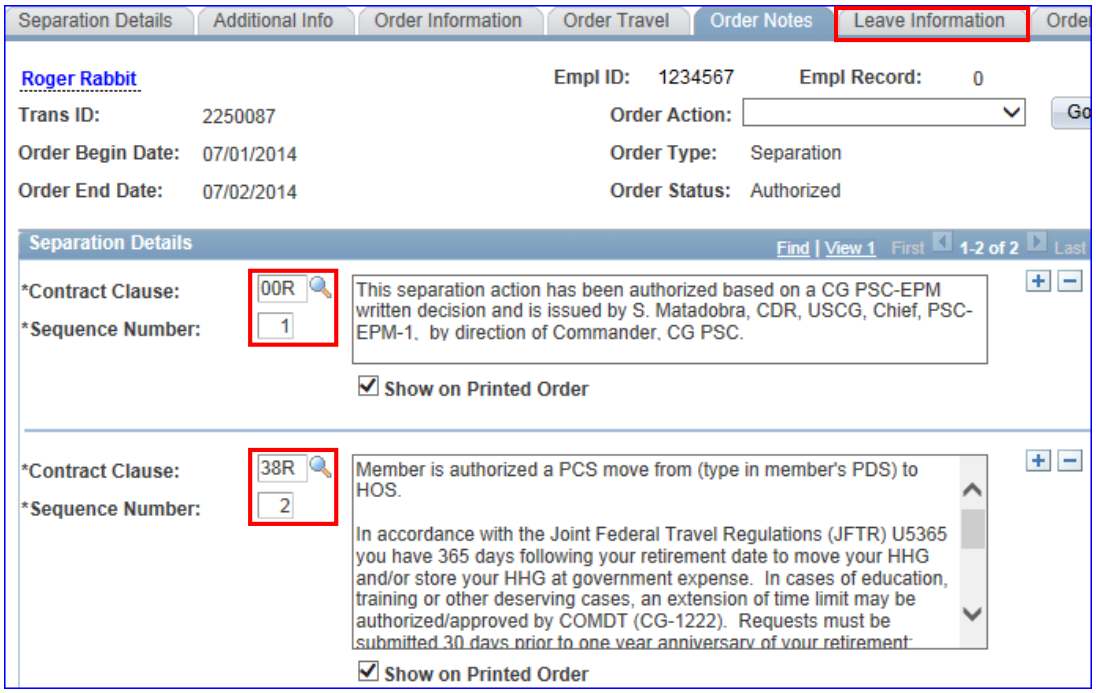
**Procedures**, continued

| Step | Action |
|---|---|
| **13** | Enter the appropriate Order Notes and edit them if necessary. Enter a Sequence Number to identify how they will appear on the orders. Then click on the **Leave Information** tab.  |



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**Procedures**,
continued

| Step | Action |
|---|---|
| **14** | Notice that the terminal leave entered on an earlier tab is reflected here. Any remaining leave balance (subject to the career maximum) will be sold and included in the member's final pay. |

| Field | Description |
|---|---|
| Leave Balance | Balance as of current pay/absence calendar (end of previous month). Does not factor in future leave requests that have been approved beyond current month. |
| Cumulative Sold Leave | Cumulative number of Leave days sold in the member's military career. |
| Total to Carry Over (Days) | Specified by the SPO if member requests. This will be subtracted from the leave available to sell. Not used for Retirements. Defaults to 0. |
| Terminal Leave (Days) | Sum of terminal leave days specified on Order Travel tab. |

Now click on the **Order Approval** tab.

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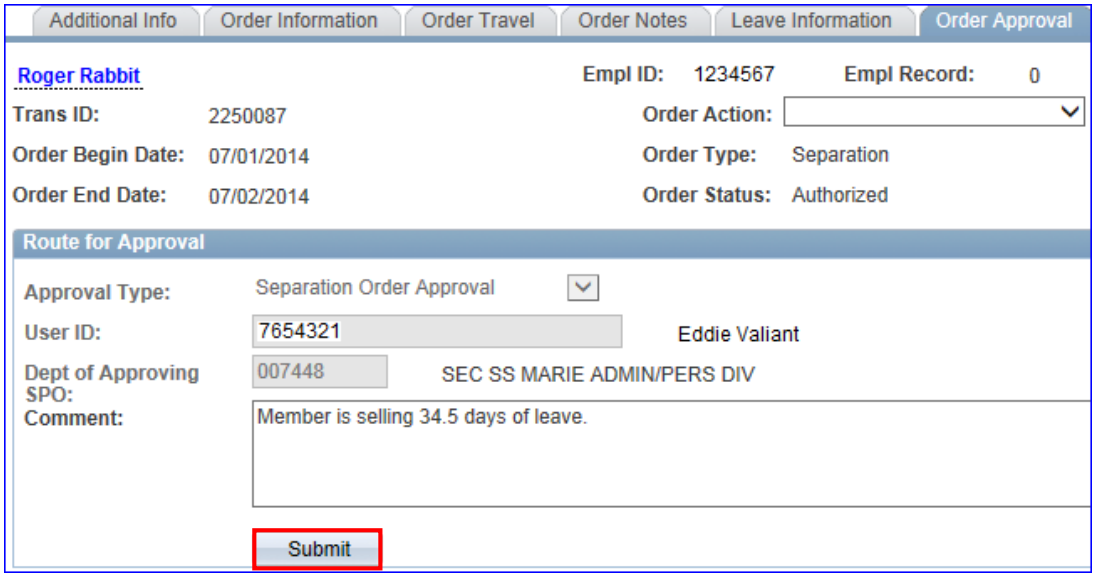
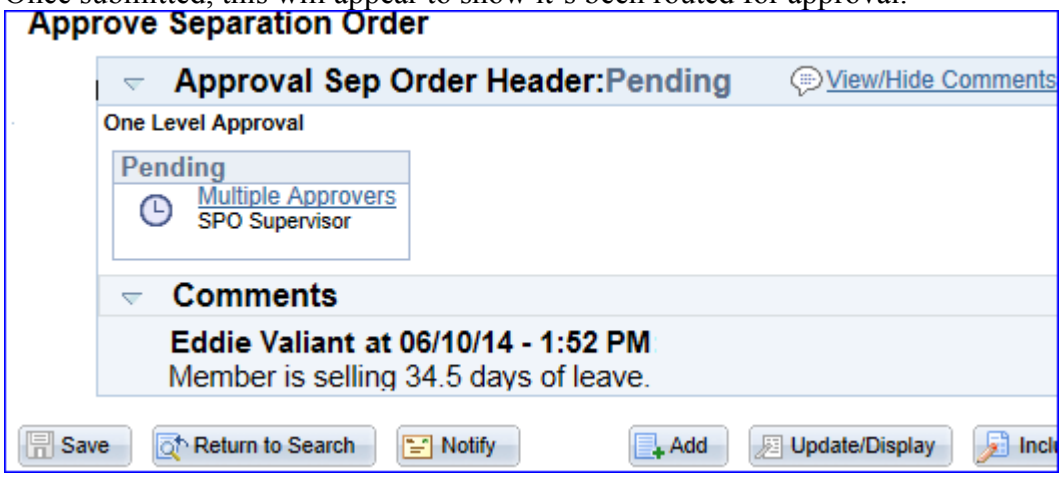
**Procedures**,
continued

| Step | Action |
|---|---|
| **15** | Now click **Submit**.<br>  |
| **16** | Once submitted, this will appear to show it's been routed for approval.<br>  |
| **17** | Now return to the Home screen. |